WESS

Module 5

Creating and Using Report Templates

What is a Report Template?

- Report Templates are Pre-established "Forms" for each type of Mishap that must be submitted on a recurring basis, e.g. Motor Vehicle mishaps.

    - Allows a user to create a report that can be re-used with the default data populated and stored in the template.

    - Creating a report from a template limits data entry to those data elements that are unique to the event.

- Why Use a Template? Templates enhance and simplify the reporting process by reducing the time necessary to enter an event, by eliminating the entry of repetitive data.

    - Templates may be established for any reason the user desires – Reports may be set up by mishap type, activity involved, location, etc.

Uses for a Report Template

- Report Templates can be used for routinely reported mishaps, such as injuries to individual workers.

    - All UIC/RUC/MCC information can be entered in the template.

    - Point of Contact name, phone number, etc. can be entered.

- Even a completed report can be saved as a template before that report is sent if you anticipate having to send a similar report in the future.

    - Make sure that when using a template new information is entered and old information is changed.

    - Remember - your template is limited to the logic - if you answer questions differently you may get offered more or different questions.

Creating a Template

After Login, the first WESS User Environment screen is displayed.

Creating a Report Template begins the same way that you would report an actual mishap.

Click "Create New Report" to begin.

Safety Hazard/Mishap Reporting System - FOR OFFICIAL USE ONLY

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WESS Naval Safety Center

Activities
- Class A/B Notification
- Create New Report
- Create From Template
- Maintain Account
- Notifications
- Return home
- JReports
- Logout

Your Existing Reports - Charles Almond

Drafts

Delete	Serl#	Date	Description
☐	1084912476358	15 May 2004	Bad Outcome

Approval Needed
Serl# Date Description

Release Pending
Serl# Date Description

Release Action Needed
Serl# Date Description

Endorsement Needed
Serl# Date Description

Select the Type of Report

Select the type of Report Template to design by clicking the radio button.

Click "Continue"

Select the Mishap Characteristics

Mishap Data Entry

▶ Help

Mishap Involved (Check all that apply to this event. These selections will determine which sets of questions are presented.) *

- ☐ Aircraft
- ☐ Cargo Air Drop
- ☐ Diving
- ☐ During Formal Training
- ☐ HRST Techniques
- ☑ Motor Vehicle (Private)
- ☐ Motor Vehicle/Tactical Vehicle > $5K Damage
- ☐ Ordnance/Weapons
- ☐ Parachuting
- ☐ Property Damage (Non-US Govt. Owned) > $20K Caused by Govt.
- ☐ Property Damage (US Govt. Owned) > $20K
- ☐ Recreational or Off-Duty
- ☐ Ship/Sub Craft
- ☑ Shore/Ground
- ☐ None

Report will be saved each time the user advances to the next screen.

Next

The **Mishap Type** is noted by Check boxes which are not mutually exclusive. Check all that you wish to apply to this template.

E.g., Private Motor Vehicle Mishaps Ashore

Click "Next"

Saving a Template

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Mishap Data Entry

WESS Naval Safety Center

Activities
- Save as template
- Share report
- Notifications
- Return home
- Generate PDF
- JReports
- Logout

My Report
- General Information
  - Point of Contact
  - Safety Specialist
  - JAG
  - EI
- Location
- Environment
- Personnel
- Property Damage
- Cause Codes
- Validate
- Routing Information
- Release Report

Mishap Involved (Check all that apply to this event. These selections will determine which sets are presented.) *

☐ Aircraft

☐ Cargo Air Drop

☐ Diving

☐ During Formal Training

☐ HRST Techniques

☑ Motor Vehicle (Private)

☐ Motor Vehicle/Tactical Vehicle > $5K Damage

☐ Ordnance/Weapons

☐ Parachuting

☐ Property Damage (Non-US Govt. Owned) > $20K

☐ Property Damage (US Govt. Owned) > $20K

☐ Recreational or Off-Duty

☐ Ship/Sub Craft

☑ Shore/Ground

Users may access other data points in the mishap template by clicking directly in the report directory tree at lower left.

Recurring data entries, such as POC, Safety Specialist info, location, etc may be entered into the template.

For Demonstration purposes, to save the Template now,

Click on "Save as template" in the activities list at left.

Name & Save the Template

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Please enter the name of the template

▶ Help

Activities
- Save as template
- Share report
- Notifications
- Return home
- Generate PDF
- Logout

Template name: Motor Vehicle-PMV

Back   Next

Enter a Unique Name for this Report Template, reflecting its intended purpose.

Click "Next" to Save the Template and Return to the Main User Environment.

Creating a Report from A Template

At the WESS User Environment screen, Click on "Create from Template"

A Template Menu screen will appear next.

Using the template for entering a report allows faster entry and reduces repetitive entries.

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Your Existing Reports - Charles Almond

Activities
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Drafts

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Select a Template

Safety Hazard/Mishap Reporting System - FOR OFFICIAL USE ONLY

Select Template

▶ Help

Choose template to use
- ○ OSH – On-Duty
- ○ Recreation
- ○ Explosive/Weapons
- ○ Motor Vehicle-GMV
- ○ Motor Vehicle-PMV

Back   Next
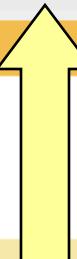
Activities
- Class A/B Notification
- Create New Report
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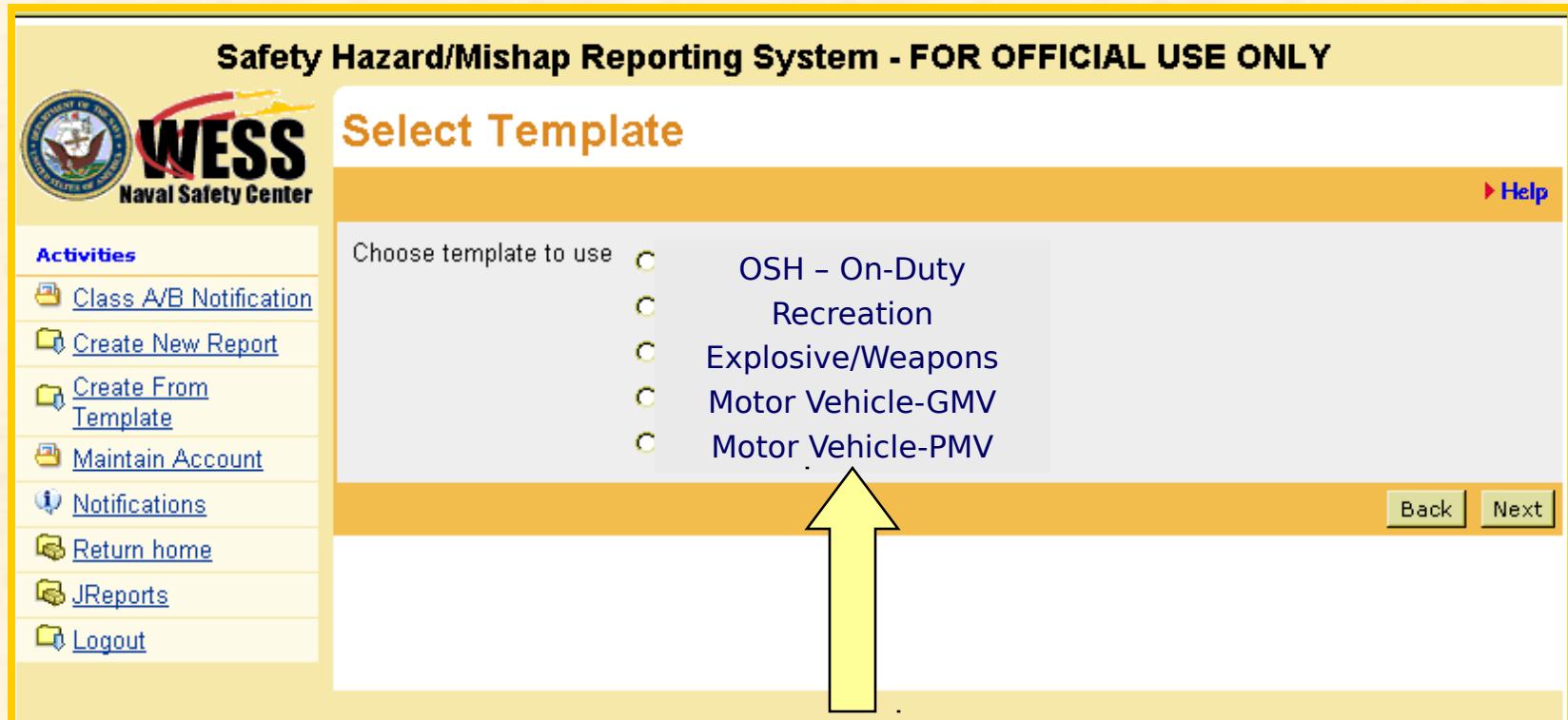
The new Motor Vehicle PMV mishap report template is now displayed in the Template Menu along with others already created.

To report a PMV event, select the template and click "Next". Using this template, the static information is already in place. Only the data unique to the event must be entered.

Editing Draft Reports

To learn about Editing Draft Reports,

[Continue to Module 6](#)

[Back to Table of Contents](#)